

ProjectWise Deliverables Management Workflow

NOTE:

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI = Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

Remember: The sending user issues a ***Transmittal***, and the receiving user receives a ***Submittal***.

External Participants – Respond to Transmittals

1. When receiving transmittals, you will be notified via email.

Hello Glenn Williams,

You have received a new submittal package.

To view it, click the link below or paste it into your browser's address bar:

[Tuesday Morning Test.](#)

Submittal details

Project: Testing (projectWise Deliverables Mngt)

Subject: Tuesday Morning Test

Purpose: For Review

Content: 13

Acknowledge by: 3/31/2016 11:22 AM Coordinated Universal Time

Respond by: 4/12/2016 11:22 AM Coordinated Universal Time

Issued by: Glenn Williams, glwilliams@dot.ga.gov



This is an automatically generated email notification sent via ProjectWise Deliverables Management service.

Do not reply to this email. Instead you can [tell us what you think about ProjectWise Deliverables Management](#)

2. To open the package from the email notification, click the link in the email.

Hello Glenn Williams,

You have received a new submittal package.

To view it, click the link below or paste it into your browser's address bar:

[GDW PFPR](#)



3. When your browser opens, sign in with your Bentley account.
 - a. Enter your Email Address.
 - b. Enter your **Password**.
 - c. Click **Sign In**.
4. After successfully logging in, the ProjectWise Deliverables Management portal for the project will open.

Deliverables management > Incoming > 654321-SM-0000003

Tuesday Morning Test
ID 654321-SM-0000003

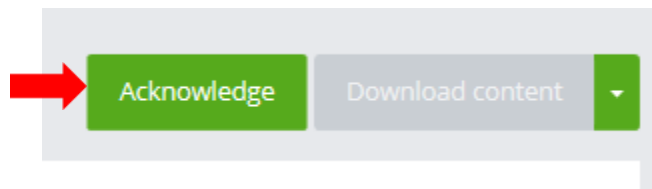
[Acknowledge](#) [Download content](#)

General Recipients Documents

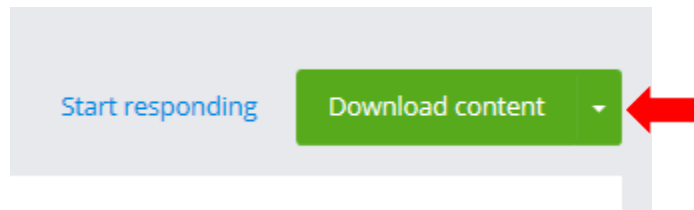
Project Testing (projectWise Deliverables Mngt)
Subject Tuesday Morning Test
Issued by Glenn Williams <glwilliams@dot.ga.gov>
Issue date 03/29/2016 7:22 AM EDT
Purpose For Review
Comments Testing on Tuesday
Cover letter Cover letter - _654321-TR-0000019.pdf

Status
Acknowledgement
⌚ 2 days to acknowledge
Due date: 03/31/2016 7:22 AM EDT
Response
⌚ 14 days to respond
2 documents to respond
Due date: 04/12/2016 7:22 AM EDT


5. Click on **Acknowledge** in the top right corner to acknowledge receipt of the transmittal and to start the review process.



6. Click on the **Download Content** link in the top right corner to download the transmittal content to your computer to begin responding to the request for review. Any mark-ups will be done after the content is downloaded to your computer/server/etc.



7. Once you are ready to respond, reopen the transmittal using the link in the email you received.
8. Click on the **My Response** tab to see all files attached to the transmittal.
9. Click on the plus sign (“+”) to the right of one of the documents to open the response dialog for that file.
10. From this dialog:
 - a. Select a **Response** from the dropdown
 - b. Add any general comments
 - c. **Browse** for the documents you marked-up offline to send that back as part of the response
 - d. (Optional) You also have the option of sending the transmittal to **Additional Reviewers**. (You will possibly have to manually add the additional reviewers if they are individuals not already setup in your organization.)


 PFPR Report_654321.pdf

My response

Additional reviewers

Attributes


Response


 Approved with comments ▾

Comment

See comments/mark-ups in file

Attachments

 PFPR Report_654321.pdf



Browse

11. Once all responses have been completed, you can either:
- Click on **Send Responses** to send all responses.
 - Click the arrow beside **Send responses** and select **Send selected responses** to respond only to a portion of the review.

